Sales Order Inbox

Module Guide: Sales Order Inbox (Direct Selling)

Module Location

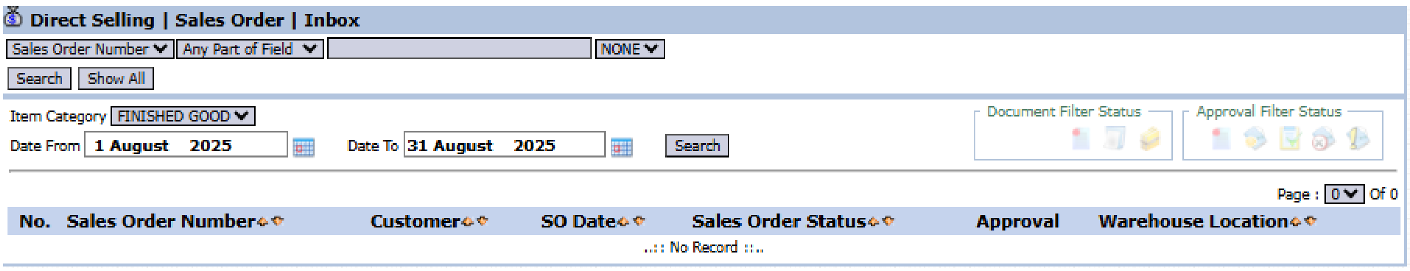
Direct Selling > Sales Order > Sales Order Inbox

Module Objective

The **Sales Order Inbox** module for Direct Selling serves as the approval center for all Sales Orders created via the direct selling channel. This module is used by a superior or manager to conduct a review and provide approval before the order can be processed further.

1. Main View (Order List)

The main page of this module is an "inbox" that displays all Direct Selling Sales Orders requiring your action.



View Explanation & Filters

This page provides a summary of all orders that are awaiting approval.

- **Filters**: You can search for a specific order by **Sales Order Number**, **Item Category**, or a date range (**Date From / Date To**).

- **Request List**: The table below will display all orders awaiting action. The table currently shows "...No Record...".

Column Explanation

- **Sales Order Number**: The unique number of the submitted Sales Order document.

- **Customer**: The name of the customer associated with the order.

- **SO Date**: The date the order was created.

- **Sales Order Status / Approval**: Icons that indicate the document's status and the approval process status.

- **Warehouse Location**: The warehouse location associated with the order.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Sales Order Inbox** module to see the list of orders that require approval.

Step 2: Review the Order Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the product details, prices, discounts, and payment terms.

Step 3: Provide Approval

After you open and review the Sales Order details in Step 2, you will find the buttons to grant approval (e.g., **"Approve"** or **"Reject"** buttons) **within that detail page**. Click the appropriate button to complete the review process.

3. Workflow & Integrated Business Process

1. **Submission**: A user (e.g., a canvassing salesman) creates a document in the **Sales Order (Direct Selling)** module and clicks **Confirm**.

2. **Entering the Queue**: The confirmed order automatically enters the queue in this **Sales Order Inbox** module.

3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.

4. **Next Process**: After approval, the Sales Order becomes the official instruction for the next stage in the Direct Selling flow: the creation of a **Direct Selling Delivery Order**.

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